

Historic Resource Surveys and Local Planning

Marie Nelson

State Historian II
OHP-Survey/CLG Coordinator
www.ohp.parks.ca.gov

26 March 2008

League of Cities - Sacramento

- What is a Historic Resources Survey?
- Why survey historic resources?



What is a Historical Resources Survey?

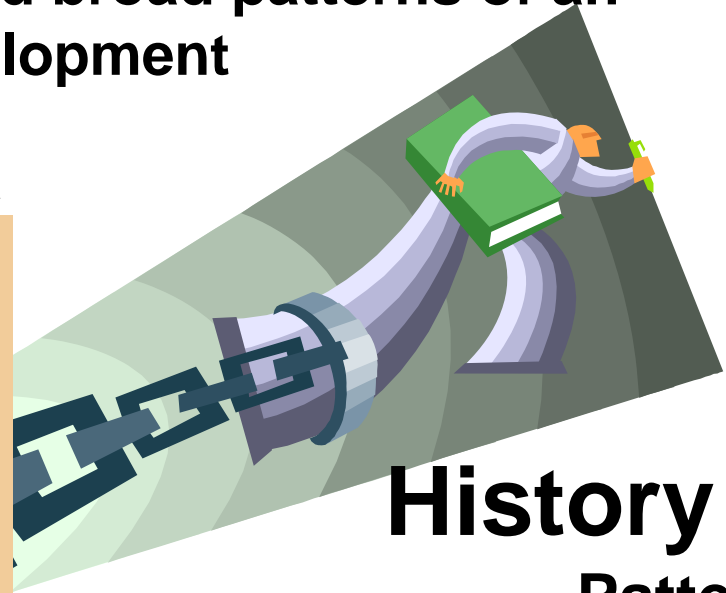
- **Systematic process** for
 - *Gathering information* about a community's historical resources.
 - *Identifying* and
 - *Evaluating* the quantity and quality of historical resources for *land-use planning purposes*.



HISTORIC CONTEXTS

Describe significant aspects and broad patterns of an area's history and cultural development

Built Environment



History

Pattern
Events
People
Values

HISTORIC CONTEXTS

- **Synthesize** information about significant historical patterns, events, people, groups, and values
- **Identify** the property types* and locational patterns which represent important historic patterns, events, people or groups
- **Identify** characteristics each property type needs to represent the property type within the context
- **Identify** eligibility and integrity thresholds
- **Facilitate** better understanding of relative importance of resources for initial study as well as planning purposes

*Groupings of individual properties based on shared physical or associative characteristics

HISTORIC CONTEXTS also

- *Identify* additional Information Needs
- *Recommend* Preservation Goals and Strategies
- *Evolve* as additional information is acquired
- *Permit* identification, evaluation, and treatment of resources even in absence of complete knowledge of individual properties.

CONTEXTS



For decisions about identification, evaluation, registration and treatment of historic properties

SURVEY METHODOLOGY

- Research
- Identification
- Evaluation
- Documentation
- Planning



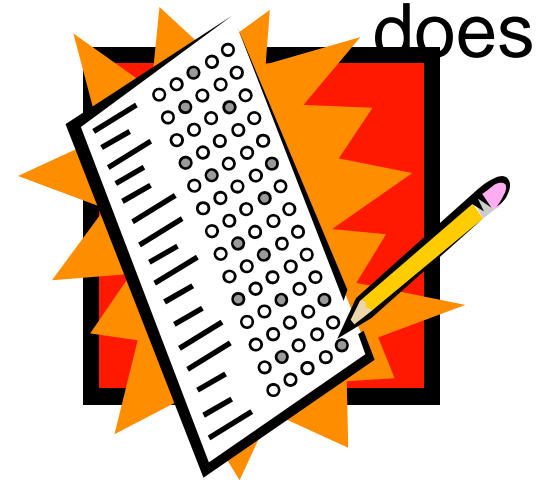
IDENTIFICATION

- **Identify** the kinds of historic properties within the surveyed area
- **Identify** potential historic districts
- **Identify** where no historic resources are present
- **Identify** properties that do *not* merit further attention
- **Identify** potentially significant individual buildings or areas which merit further identification and evaluation



EVALUATION

- What **context** and **property type** does the resource represent?
 - What **criteria** apply?
 - What is its **significance**?
 - Does it have the expected **character-defining features** for its type?
 - Is it a **contributor** to a **district**?
 - Does it possess the **integrity** characteristics for its property type within the defined context?
- Multiple contexts/multiple periods of Significance?**



DOCUMENTATIO



- **Document** all historic buildings, structures, sites, objects and potential districts in *sufficient detail* to allow for *informed land use planning decisions*.
- **Define** essential physical features, also called *character-defining features*, that must be present to represent the property's significance.
- Results in an *inventory* of significant properties
(SURVEY DOCUMENTATION IS **NOT** DESIGNATION)

SURVEY UPDATE

Identification – Evaluation - Documentation

- Fill in gaps –
- Develop contexts where there were none
- Consider significance within additional contexts
- Evaluate with current understandings and methodology
- Evaluate integrity and current condition
- Evaluate as contributor to district
- Electronic database – public access

PUT IT ALL TOGETHER

- HISTORICAL CONTEXTS
- SURVEY DATA
- INVENTORY*
- SURVEY REPORT
- RECOMMENDATIONS
- REVIEW
- “ADOPTION”
- INTEGRATION –
Planning & Zoning

*ALL identified and evaluated resources



WHY SURVEY?

Historic Resources = ASSETS

=INVESTMENT

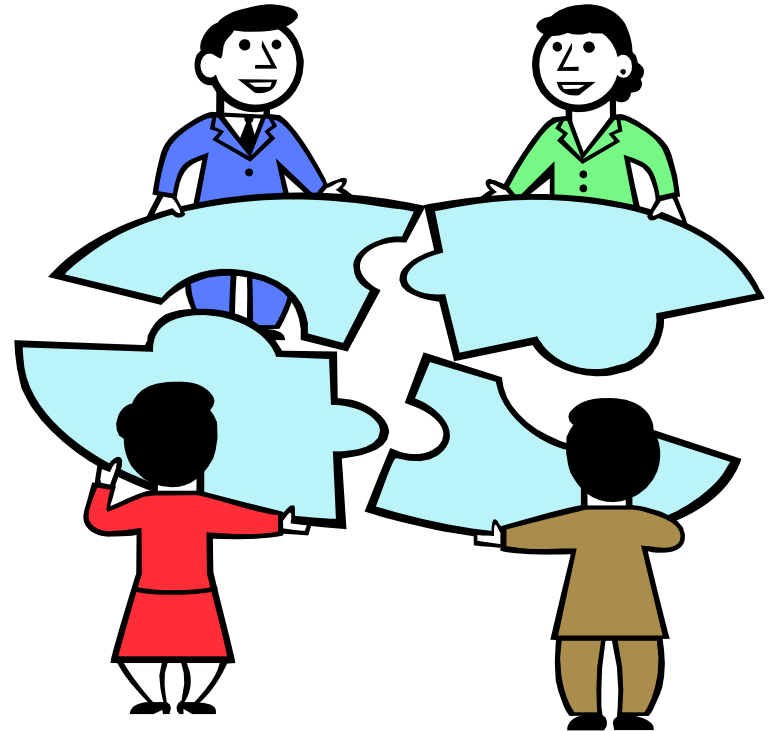
- Time
- Materials
- Labor
- Capital
- Energy



INTEGRATE PRESERVATION PLANNING

Planning =

- Wise management of assets
- Effective use
- Multiple benefits
- Respect value
- Prolong life
- “Stewardship”



SURVEY PLANNING

- ✓ Funding?
- ✓ Survey goals?
- ✓ Priorities?
- ✓ Survey what? Where?
- ✓ Who will do what? When?
- ✓ Public Involvement?



SURVEYS PROVIDE CLUES

- **What** resources exist?
- **Where** are the resources are located?
- What are the **character defining features**?
- Why are they **significant**?
- Have they retained **integrity**?
- How does each need to be treated?

Revisit, Reevaluate, Update



**Historic
Preservation**

**Zoning
&
Planning**

**Disaster
Planning
&
Response**

**Environmental
Review
Sec 106
CEQA**

**Transportation
Planning**

**Heritage
Tourism
Initiatives**

**Community
Development**

**Affordable
Housing
&
Adaptive
Reuse**



Disaster Planning &

- Identify significant historic resources before disaster strikes.
- Response to disaster is different for historic buildings.
- PRC 5028 – NR/CR/Local Registers
- Prevents demolition of buildings that could /should be preserved.

Transportation Planning

- Know where the historic resources are before planning transportation paths.
- Identify existing infrastructure that is under-utilized and/or will need to be upgraded with adaptive reuse.
- Plan to avoid adverse impacts to historic districts and neighborhoods when possible.

Affordable Housing and Adaptive Reuse

- Identify buildings suitable for rehabilitation and adaptive reuse
- Establish eligibility for incentives
- Develop plans for the adaptive reuse of existing housing stock
- Develop design guidelines for compatible infill for historic and conservation districts or neighborhoods

Community Development

- Identify zones for redevelopment & revitalization
- Provide economic and other incentives to promote conservation and preservation
- Maintain and enhance property values
- Establish eligibility for federal funding and tax incentives
- Foster pride of place and appreciation of cultural heritage
- Sustain or improve quality of life by maintaining neighborhood character

Heritage Tourism Initiatives

- Promote and develop business uses compatible with historic districts
- Develop and enforce ***Design Guidelines*** to retain the character of historic districts and neighborhoods
- Develop walking/driving bicycle tours of historic areas
- Prescribe Maintenance Practices

Environmental Reviews

- Local Preservation Ordinance
- Streamline Permit Review Process
- Facilitate CEQA reviews
- Section 106 for federally funded, licensed, and permitted projects including cell towers

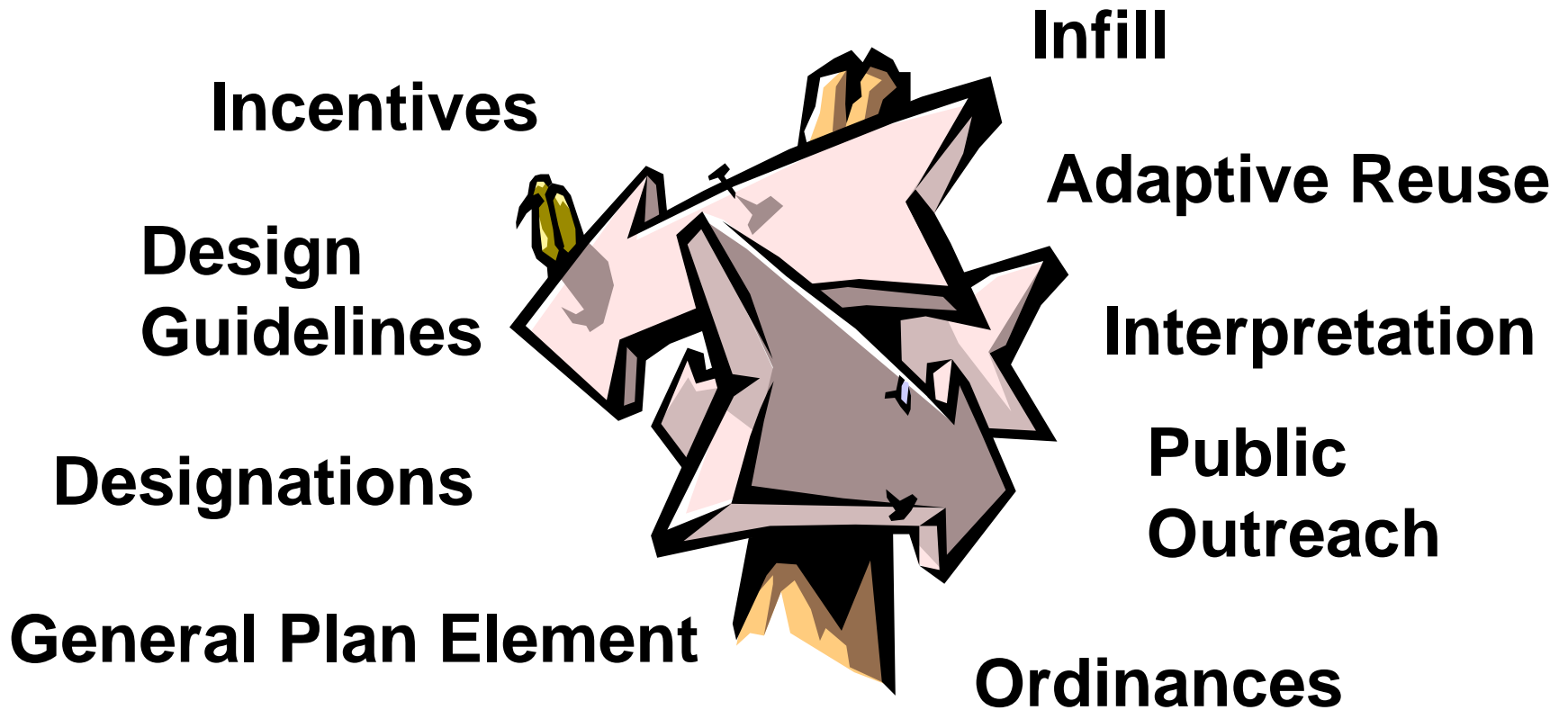
Historic Preservation

- General Plan Element
- Preservation Ordinance
- Local designations
- National and California Registers
- Facilitate use of Federal Historic Preservation Investment Tax Credits
- Historic Building Code

Integrate HP into Zoning & Planning

- Historic Districts
- HPOZs
- Conservation Districts
- Development Zones
- Design Guidelines and Review
- Infill standards
- Streamlining Permits/COAs

SURVEYS



Provide Direction for Preservation Strategies

For More Information:

- **“Guidelines for Local Surveys: A Basis for Preservation Planning,”** *National Register Bulletin 24*,
www.cr.nps.gov/nr/publications/bulletins/nrb24/
- **Archeology and Historic Preservation: *Secretary of the Interior's Standards and Guidelines*** for Planning, Identification, Evaluation, and Documentation of Historic Resources,
www.cr.nps.gov/local-law/arch_stnds_0.htm
- **Office of Historic Preservation**
www.ohp.parks.ca.gov